

A photograph of two men in a ship's bridge, both wearing caps and looking through binoculars. The man in the foreground is in profile, wearing a dark shirt and a cap. The man in the background is also in profile, wearing a light-colored shirt and a cap. They are standing in front of a large window looking out at the sea. The bridge is filled with various electronic equipment, including monitors and control panels. The overall tone is professional and focused.

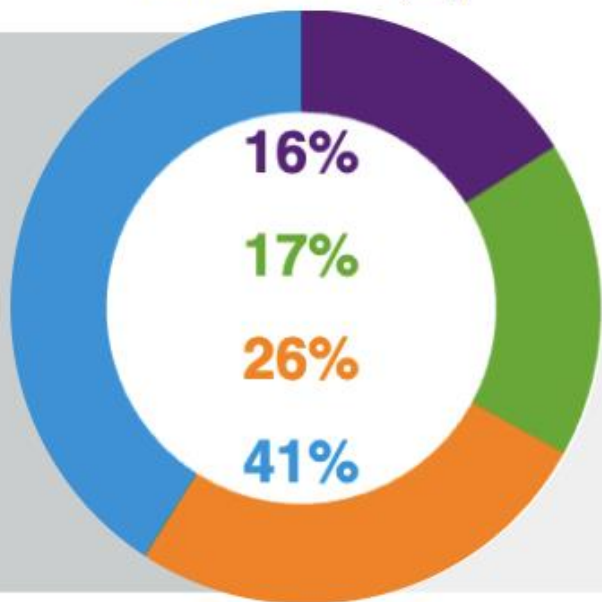
DAY 1

Customer Relationships

Assessing Team Strengths for Stronger Relationships

Decathlete Self-Assessment Data

Before STAR® (21)



Four Domains of Leadership

Doing:	41%
Managing:	26%
Leading:	17%
Coaching:	16%

Business Impact

\$21,600

Success Category	Number of Successes	% of Success
Engagement/productivity	12	70.6%
Technical/process	2	11.8%
Operations/service	1	5.9%
Cost saving	1	5.9%
No Category	1	5.9%
Revenue generation	0	0.0%
Total	17	100.0%

Neuroscience of Questions

- Reflection affects the pathways in the brain
- Multiplies brain connections
- Builds upon resources to recall the information (solution)
- Leads to sustained behavior change (for both)

The STAR[®] Model



Telling vs. Coaching

TELLING:

- Expedient
- No learning
- Must be told AGAIN
- No ownership

COACHING:

- More time upfront
- Once and done
- Solicits new ideas
- Creates ownership
- Transforms the culture

So, how good are you at **asking questions?**

“Questions” is not the Complete Answer

What is the *focus* of your question?

- To evaluate their work
- Confirm your decision
- Test their abilities
- Couch advice

...Or is it to help **them** THINK and gain new insights?

Active Listening

- Words
- Body language
- Tone of voice

What's easier for you to listen for?

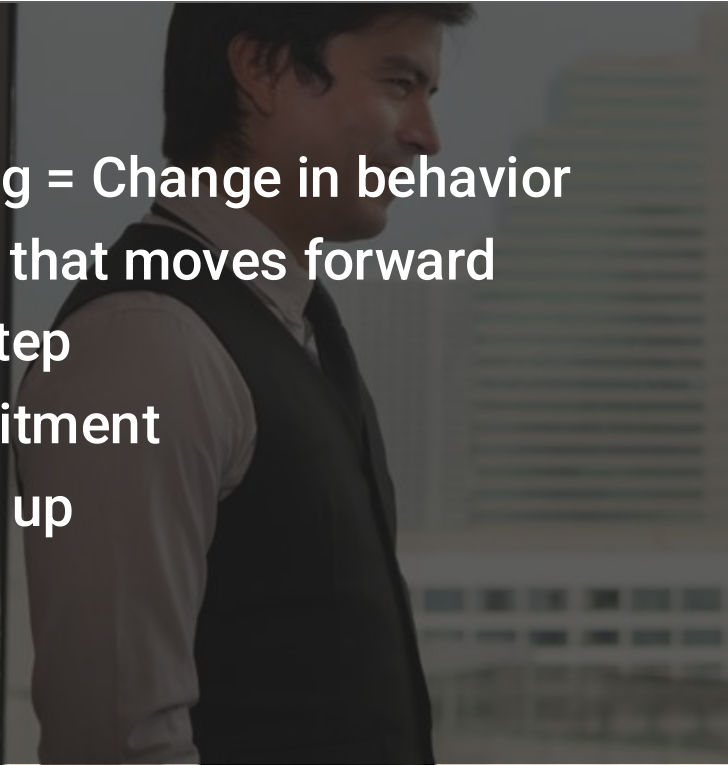
- Facts
- Emotions
- What isn't being said?



Getting Results

Coaching = Change in behavior

- Action that moves forward
- Next step
- Commitment
- Follow up



Great Coaching Questions

"If you DID know, what would you say?"

"Tell me, what's really going on?"

"What's the inevitable consequence if you keep doing what you're doing right now?"

"What are the challenges here – the REAL challenges – for you personally?"

"Imagine that you had achieved this already. Now, looking back, what you would have changed?"



For the November Session:

Complete Module 12: Enabling Others

“How to develop your people to be able to willingly step-up and be more accountable”

Predictive Index® for Team Design

Teamwork &
Employee
Experience

Process &
Precision

Innovation & Agility

TEAM MEMBERS TEND TO:

Focus on pursuing new innovations

Be open to risk and experimentation

Prefer to act quickly and assertively

Communicate by talking things through and brainstorming out loud

Make decisions independently, without waiting for consensus

Resolve conflict by focusing on the people involved

Innovation &
Agility

Results &
Discipline



Teamwork &
Employee
Experience

Innovation &
Agility

Process &
Precision

Results &
Discipline

Results & Discipline

TEAM MEMBERS TEND TO:

Focus on results and goal achievement

Be driven and competitive

Prefer a focus on tasks and execution

Communicate concisely, after thorough reflection
on their own

Make decisions independently, without waiting for
consensus

Resolve conflict by focusing on the task involved

Teamwork &
Employee
Experience

Innovation &
Agility

Process &
Precision

Results &
Discipline

Process & Precision

TEAM MEMBERS TEND TO:

- Focus on process and predictability
- Be well-organized and efficient
- Prefer analytical decision making
- Communicate concisely, after thorough reflection on their own
- Make decisions collaboratively, seeking input from each involved team member
- Resolve conflict by focusing on the task involved



Teamwork &
Employee
Experience

Teamwork & Employee Experience

TEAM MEMBERS TEND TO:

- Focus on collaboration and relationship building
- Be socially and interpersonally sensitive
- Prefer to support others to grow and develop
- Communicate by talking things through and brainstorming out loud
- Make decisions collaboratively, seeking input from each involved team member
- Resolve conflict by focusing on the people involved

Innovation &
Agility

Process &
Precision

Results &
Discipline



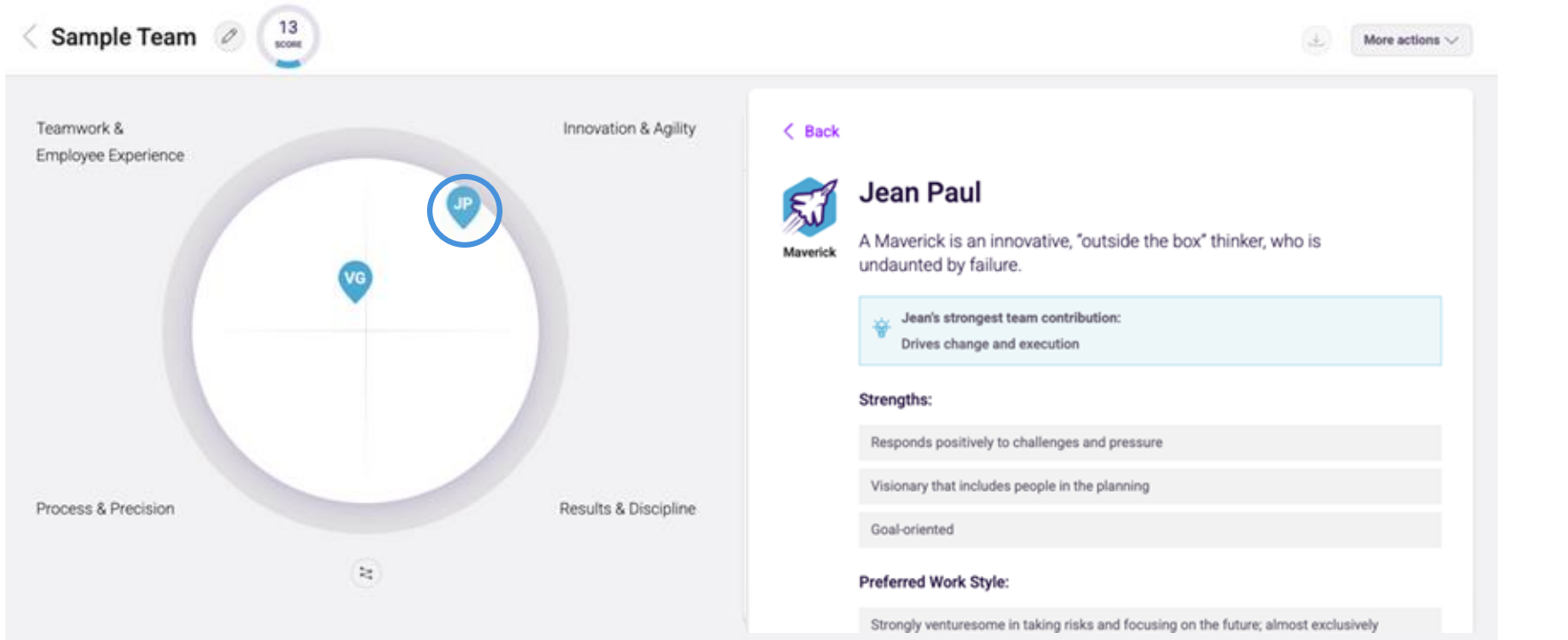
Mapping Individuals

Teamwork & Employee
Experience

Innovation & Agility



Mapping Individuals



Mapping Individuals



Mapping a Whole Team

Teamwork &
Employee Experience

Innovation & Agility



Results & Discipline

Process & Precision



Team Balancers



Why is this important?

Decisions

- Collaboration
 - Independence
-

Ideas

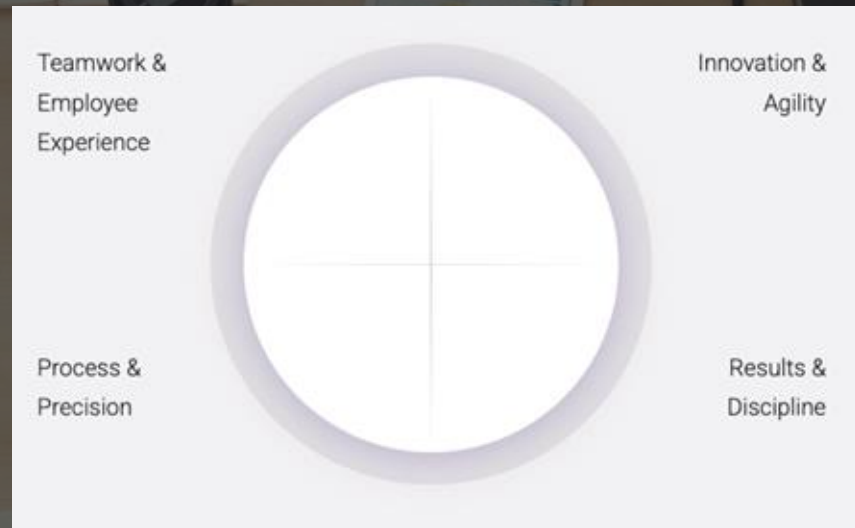
- Talk it through
 - Reflect
-

Conflict

- Task-focused approach
 - People-focused approach
-

Discussion: What is the Best Kind of Team?

- Imagine you are creating a team from scratch. You have hundreds of people to select from.
- You can have five people on the team - where might you want them, in terms of strengths on the quadrants?



Debrief

1. What might be the potential benefits of designing a team that has someone in every quadrant?
2. What might be the potential drawbacks of designing a team that someone in every quadrant?
3. Agree or disagree: The best team is a well-balanced team.
4. How do you manage a team when you can't design it?

The science of teams

127k

People

22k

Teams

9

Team Types

PI Team Types



Exploring



Pathfinding



Producing



Executing



Stabilizing



Anchoring



Cultivating



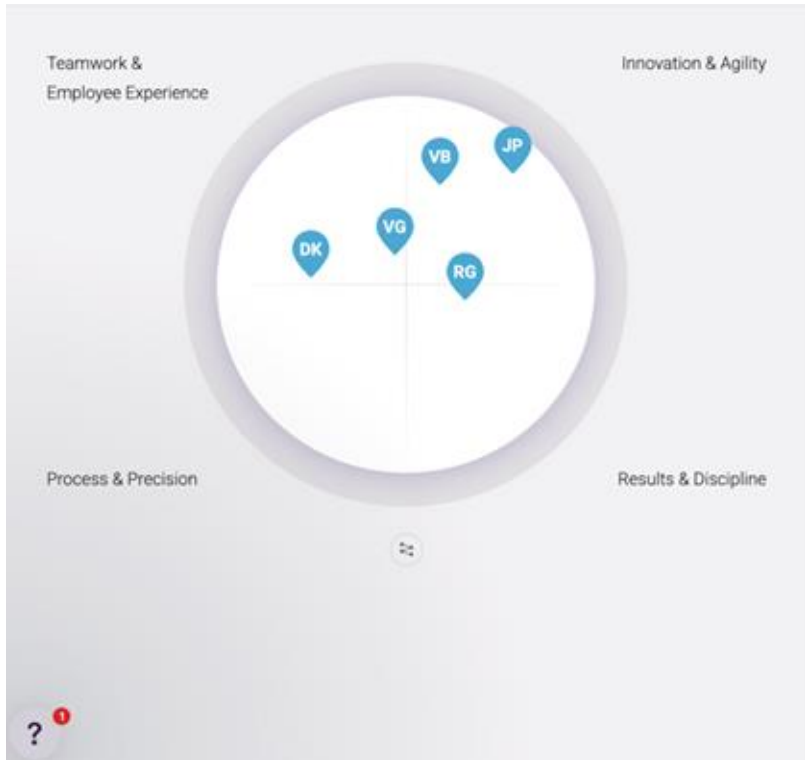
Bolstering



Adapting

Team Types

How might a team use this information?



STEP 2 Team Type ⓘ



You are an **Exploring Team**

Daring | Risk Tolerant | Imaginative

Download assets to celebrate your Team Type

You're outgoing, cooperative, and eager to work together. You have an active desire to learn and try new things. With an eye on the big picture, you share ideas—and resources—freely and informally. Innovation is the goal. People stand by their views but are willing to listen to others. This allows for constructive conflict, which helps you pressure-test or produce new ideas.

💡 18% of teams are Exploring Teams

Strengths

Ambitious and eager to drive things forward, you bring energy and excitement to your work.

Quick to make new connections, you're good at building relationships and expanding your networks.

Always asking "What's next?", you're excited about driving the market to new places.

Potential Caution Areas

With a strong focus on speed and innovation, process and efficiency may suffer.

You may be too focused on the big picture—and not enough on the details needed to implement your ideas.

You may be quick to abandon your ideas if they don't work perfectly the first time instead of iterating.



A photograph of an aircraft carrier deck. In the background, a large military aircraft is being hoisted by a crane. In the foreground, a soldier in camouflage is performing a handstand. The text "Mapping the Work" is overlaid in white.

Mapping the Work

Mapping the Work

If you were designing a new team to achieve these goals, what would you prioritize?

Teamwork & Employee Experience

Innovation & Agility

Process & Precision

Results & Discipline



Powerful Information!

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Quick to make new connections, you're good at building relationships and expanding your networks.

Always asking "What's next?", you're excited about driving the market to new places.

77% of people on Exploring Teams report that their team excels at making decisions as a group.

Potential Caution Areas

With a strong focus on speed and innovation, process and efficiency may suffer.

You may be too focused on the big picture—and not enough on the details needed to implement your ideas.

You may be quick to abandon your ideas if they don't work perfectly the first time instead of iterating.

30% of people on Exploring Teams report that their team does not communicate effectively.

ADVANCED Strategy + Objectives



You are pursuing a Stabilizing Strategy

Stabilizing Strategies seek to improve efficiency and predictability of services.

[Set New Objectives](#)

Organizations with this strategy determine how to improve or simplify internal procedures to minimize risk, trim margins, lower customer retention costs, and scale up rapidly. They standardize or automate processes, and pursue new innovations only after careful consideration. Success means achieving higher performance from existing offers and addressing service gaps to retain clients.

📊 10% of Exploring Teams pursue this strategy

Strengths

Your team can often come up with innovative ways to achieve process and precision, especially when complicated tasks don't have a straightforward path to consistency.

A preference for talking things through can help improve two-way communication where there might be a tendency to only communicate when necessary.

A need for speed can help ensure processes and procedures are efficient, and don't just exist for bureaucracy or red tape.

Potential Caution Areas

Your team may have trouble sticking to defined processes; it may prioritize speed, despite the risk of errors.

It may be difficult for your team to focus on perfecting current products and services before moving on to the next area of focus.

Your team may struggle to think through how work will get done and what the end result should look like.



Customer Case Study

HavenLiving Property Management

- Founded in 1998 by real estate investors
- A few apartment buildings in Florida
- Known for meticulous maintenance and responsive tenant relations
- Grew aggressively
- Now have regional offices in several states

What are some of the risks/challenges when a company experiences rapid growth into new geographies?



Background



Case Study: HavenLiving

Case Study: HavenLiving

Dear HavenLiving Property Management,

I hope this message finds you well. I'm writing to share a few minor inconveniences that have recently transformed my once-delightful apartment into what I can only describe as some sort of doomsday escape room.

Exhibit A: The dripping faucet

My bathroom faucet has been dripping for 8 weeks. I assume that the faucet now qualifies for a spot on the lease. I've named it Drippy. Drippy and I get along well, except that it never sleeps and has singlehandedly inflated my water bill to sky-rocketing heights. I can only assume that Drippy is in some secret kickback deal with the local water department.

Exhibit B: The thermostat is gaslighting me

I turn it up, it turns itself down. I turn it down, it turns itself back up. It's either 63 degrees or 83 degrees. The thermostat and I are considering couples therapy to end this toxic relationship.

Exhibit C: The maintenance request black hole

I've submitted several written maintenance requests and have never received a reply. I now believe that you have such a large quantity of unanswered maintenance requests that the pile has created its own field of gravity which is so strong no request can escape and make it into your maintenance queue.

Exhibit D: Communication?

I've left several voice messages with the leasing office for updates on repairs and billing. I am now starting to think the messages are being placed into some sort of time capsule that you will listen to in the next century and say: "Hahaha, remember when apartments had thermostats!"

In summary:

I say all this with humor because I do enjoy living in this community — but a little more consistency in communication and responsiveness would go a long way. I know things are busy, but I'm confident that with a few system tweaks, HavenLiving could keep me as a tenant.

Thanks for your time, and please send help (and maybe a wrench).

Warm (and sometimes freezing) regards,

Jordan M.

Apartment 204B

The Glades at HavenLiving

P.S. Drippy says hi.

The CEO weighs in

- Decides to create a tiger team
- Cross-functional representation
- Identify root causes for customer service issues
- Recommend and implement high-impact solutions (short term and long term) to remedy the customer service issues.



Meet the Tiger Team!



VP of Operations



Director of Customer Experience



Director of Regional Expansion



Director of HR/Learning & Development



SVP of Technology and Systems

Root Cause

- A root cause is the **fundamental reason** why a problem occurs
- it's the underlying issue that, **if addressed, would prevent** the problem from happening again.
- It's different from symptoms (what you see) or immediate causes (what directly triggered the problem).

Customer Service Issues

- Brainstorm possible causes that might explain some of the customer service issues identified in the complaint letter.
- What might be the root cause?

CEO Objectives

Goal	CEO Rationale
Increase team cohesion in order to improve team level results.	The teams at remote offices are not gelling. There has been a lot of turnover in some locations. Some locations have lost the passion for customer service that was once a cornerstone of the company.
Implement structures or procedures to handle the needs of our growing workforce.	We are growing fast and want to open some new locations in the near future. We need to onboard new people and get them up to speed quickly.
Cut down on waste and improve efficiency in our work to help improve the bottom line.	We are not working efficiently. Timing is essential, or a small leak turns into a major repair if we can't get this working like a well-oiled machine.

Teamwork & Employee
Experience

Innovation & Agility

Increase team cohesion in order to improve
team-level outcomes.

Implement structures or procedures to
handle the needs of our growing workforce.

Cut down on waste and improve efficiency
in our work to help improve the bottom line.

Process & Precision

Results & Discipline



Teamwork & Employee
Experience

Innovation & Agility

*Select your top priorities on the right to
unlock insights about your Team Type
in the context of your work objectives.*

Process & Precision

Results & Discipline

Identifying Team Type

Each group will receive a packet.

- The tiger team data will differ but the process is the same.
- Answer the questions in your packet and prepare a description of your team that includes:
 - Team type
 - Your observations about the team
 - A caution area

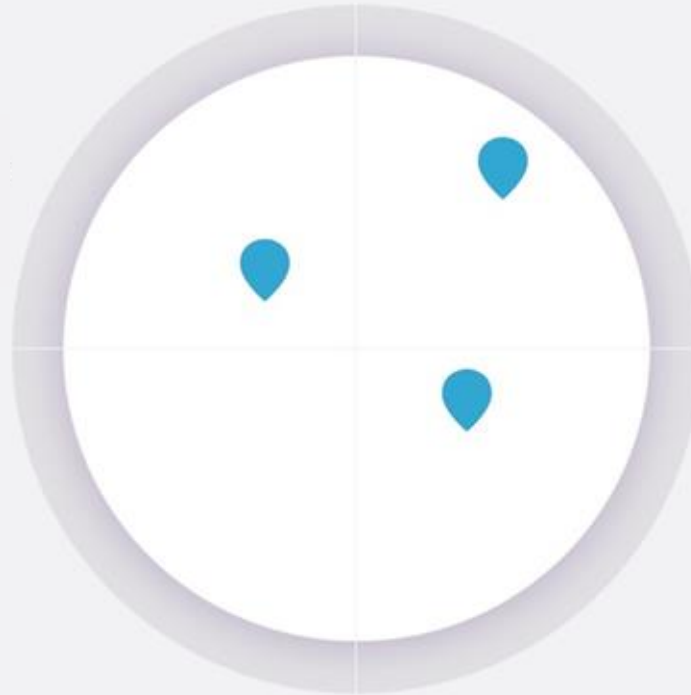
The Team Map

Teamwork &
Employee Experience

Innovation & Agility

Process & Precision

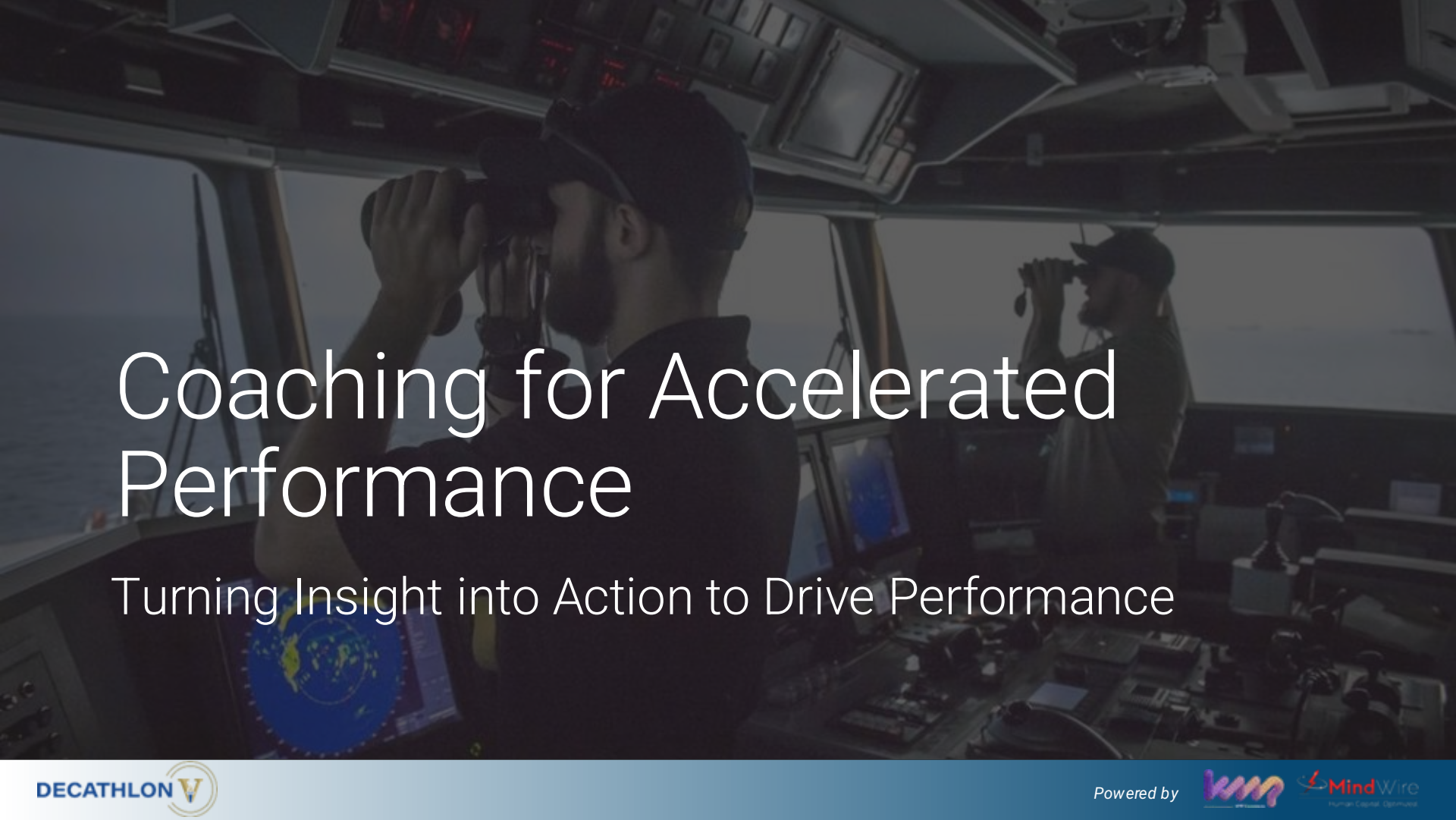
Results & Discipline



Activity: Your Teams

- Log into the PI software.
- Create Your Team in “Design”
- Find your team and click “Continue Team Discovery.”
- Answer the questions in your workbook.



A dark, atmospheric photograph of two men in a ship's bridge. The man in the foreground is wearing a dark cap and a black shirt, looking through binoculars. The man in the background is also wearing a cap and a light-colored shirt, also looking through binoculars. The bridge is filled with various electronic equipment, including multiple monitors and control panels. The background shows a view of the sea through the bridge windows.

Coaching for Accelerated Performance

Turning Insight into Action to Drive Performance

Leaders and Managers

Think about the best coach
you've ever had.

What did they do (or not do) that
made them so effective?

What was their **impact** on you?



A high self-awareness score is the **strongest predictor of overall success** in leadership.

[Green Peak Partners and Cornell University](#): The Benefits of a Self-Aware Team, 2018

Engagement | GALLUP

Engagement isn't about
happiness...
It's about productivity.

18%

Higher
Productivity

20%

Higher
Sales

23%

Higher
Profitability

58%

Fewer Employee
Safety Incidents

41%

Fewer Quality
Incidents

10%

Higher Customer
Metrics

81%

Lower
Absenteeism

43%

Lower
Turnover

28%

Less
Shrinkage

Gallup, 2023



70% of fluctuation in engagement is directly attributable to the **quality** of the manager.

Leaders who focus on strengths create more engaged employees.

Source: Gallup, 2024

Feedback, Feedback, Feedback!

AMOUNT OF FEEDBACK RECEIVED

MANAGER RATING (1-10)

None

4.2 (bad)

Some; would like more

6.5 (ok)

Just right

8.6 (good)

More than I need

7.1 (ok)

Way too much

4.5 (bad)

44% of respondents got none or less than they desired.
Only 53% of high performers say they get monthly feedback.

Source: 2018 People Management Survey, Predictive Index

High Performer (“HP”) Insights

800%

Even More Valuable
Than You Think

HPs are 8x more productive than
average performers.

Engaged?

Maybe Not.

HPs are only “very slightly”
more satisfied than others.

Staying?

Maybe Not.

20% of HPs intend to leave
in the next six months.

#1

Compensation

For HPs, the #1 satisfaction and
retention factor is compensation.

#2

Coaching & Feedback

For HPs, the #2 retention and
satisfaction factor is coaching and
feedback.

How Often?

Monthly Feedback

HPs want coaching and feedback
on a monthly basis. The vast
majority of employers don’t come
close to delivering.

Reviewing the Math – *Who to Focus On*

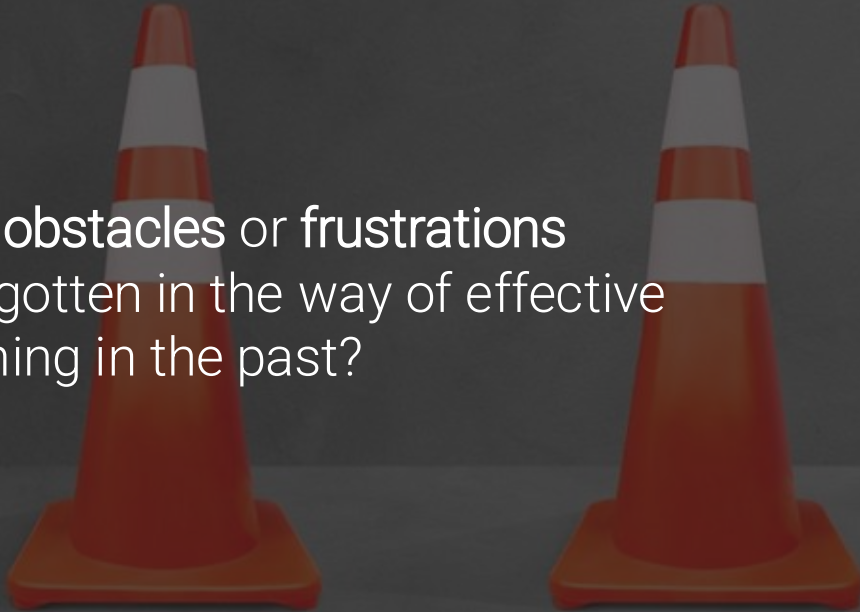
Performance:	Loans/month:	Productivity vs. top 50:
Top 50 Performers:	12	--
Average Performers:	4	33.3%
Bottom 50 Performers:	1	8.33%

Performance	# Loans/Month	Performance Increase	# Employees Improved	Add'l Loans/Year
High	12.0	7%	*30 Employees	303
Average	4.0	10%	*63 Employees	302
Low	1.0	25%	*100 Employees	300

Actual Client Performance Data. Names redacted for privacy and security.

Your Coaching Experiences

What **obstacles** or **frustrations** have gotten in the way of effective coaching in the past?



What is Needed?

When should the leader **train?** **coach?** **manage?** **mentor?**

If the employee/coachee needs...		...then the leader/coach provides:
Knowledge. Understanding.		TRAINING
Practice executing. Confidence.		COACHING
Failure prevention.		MANAGEMENT
Enhancement of good performance.		COACHING/MENTORING

Good coaching is intended to:

- Increase performance. NOW.
- Improve retention (especially high performers).
- Enhance engagement.
- Develop.

Source: "The Coaches View" Insights on Successful Coaching From CCL

Fundamentals of a Coaching Conversation

- State your purpose.
- Share observations.
- Ask questions.
- Help *them* find the solution (don't give them the answers!)
- Transfer ownership of action items.

Role Play A

Take five minutes to prep.

Play the scenario. You have 10 minutes.

Take five minutes to debrief/discuss with your partner.

Liz and John

Case Study:

Turn to page 20 in your workbook.

Let's read through the interaction
between Liz and John together.

Liz



Branch Manager

John



Bank Teller

Liz and John – Case Study

Debrief:

What's at stake?

Who (or what) was right?

Who (or what) was wrong?

Liz



Branch Manager

John

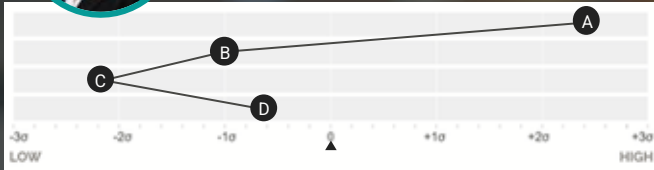


Bank Teller

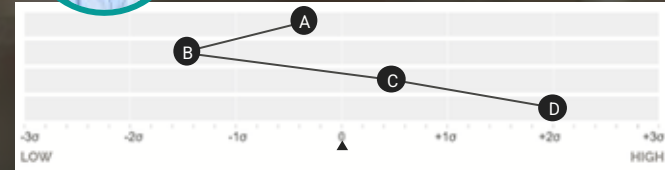
Activity: Liz and John



Liz, Branch Manager



John, Bank Teller



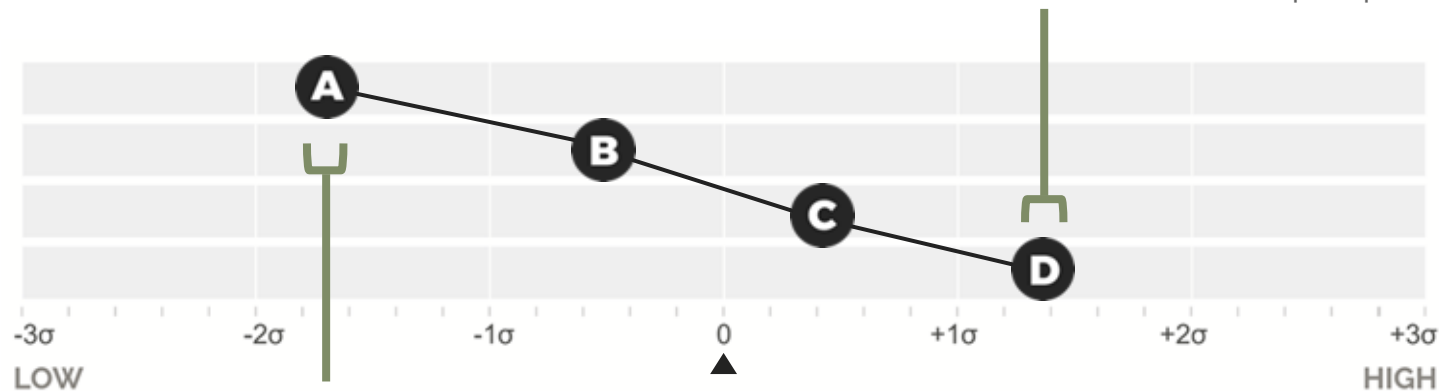
In your groups, examine Liz and John's Behavioral Patterns and answer:

1. What is **Liz's strongest Factor** (farthest from the midpoint)?
2. What is **John's strongest Factor**?
3. What **does John need** in order to be productive?
4. What **adjustments do you recommend** for Liz?

Identifying Motivating Needs

Identify the furthest RIGHT factor. That is the **strongest** Motivating Need.

Coach to, communicate to, and keep top of mind.

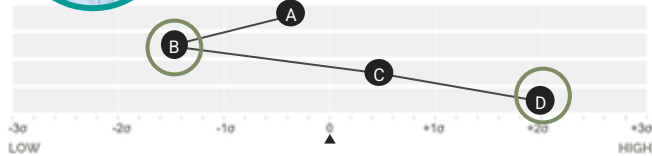


Identify the furthest LEFT factor. This is likely the **next strongest** motivating need. This should color, flavor, impact how you approach the strongest Motivating Need.

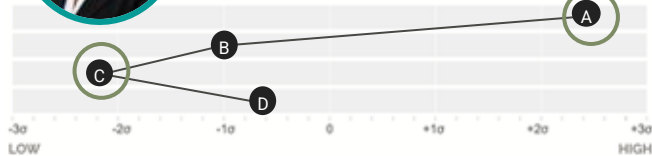
Motivating Needs



John, Employee



Liz, Leader



Strongest Motivating Needs

Their Strongest Motivating Need				My Strongest Motivating Need			
LOW		HIGH		LOW		HIGH	
☐ Harmony/Collaboration	A	☐ Outcomes/Control		☐ Harmony/Collaboration	A	☐ Outcomes/Control	
☒ Privacy/Independence	B	☐ Inclusion/Connection		☒ Privacy/Independence	B	☐ Inclusion/Connection	
☐ Action/Variety	C	☐ Stability/Predictability		☐ Action/Variety	C	☐ Stability/Predictability	
☐ Freedom/Big Picture		☒ Clarity/Expectations	D	☐ Freedom/Big Picture		☒ Clarity/Expectations	D

Similarities and differences:

Both have low extraversion (B) and like to communicate with facts and substance.

I am motivated by outcomes (A).
John is motivated by clarity (D).

Things to consider when we interact:

Be aware of my low C. Pause to provide clarity and expectations.

Ask what else is needed to provide support.

Pivoting My Style

Complete the Motivating Needs chart (prior form).

→ Identify one or two actions you can take with your employee to have more effective communication. →

Share those with your partner.



Understanding the Alien Species

Understanding the Alien Species

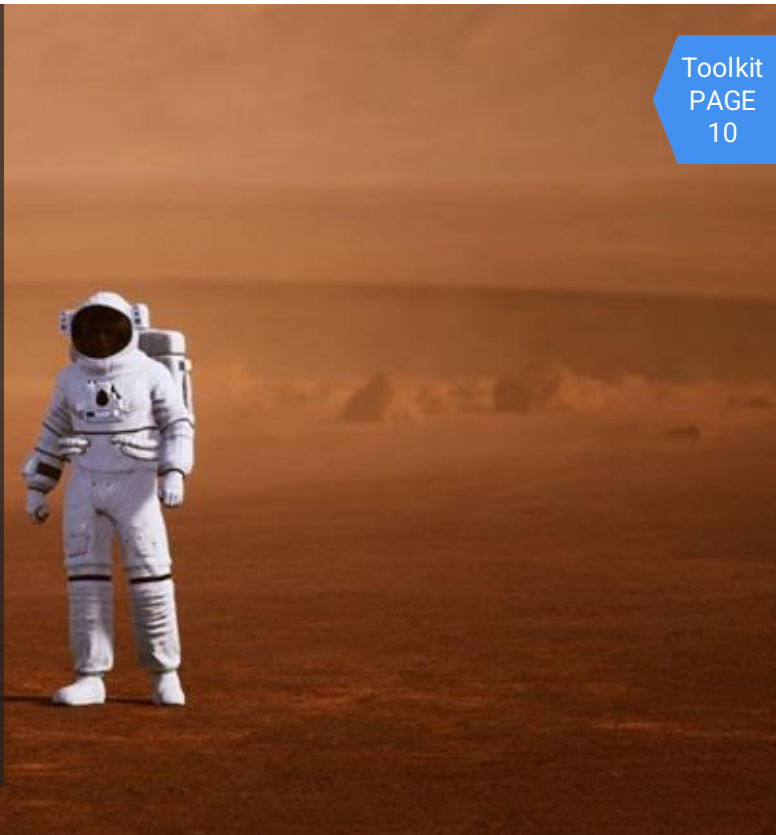
You'll pair up based on your PI Factor Combos. Fill out your workbook for your opposite Factor Combo.

- What do they value?
- What is most important to them?
- What frustrates them?

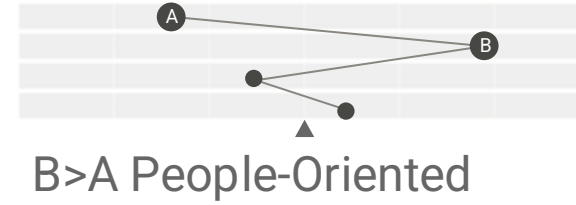
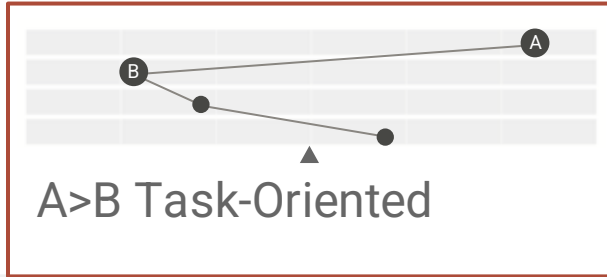
Teams:

A>B: Bethany, Brian, Patrick, Kim, Mitch, James, Gregory, Billy, Guy, Reed, Jeremy

B>A: Alexandre, Connor, Anita, Mark, Tai, Tatianna



A:B | Orientation

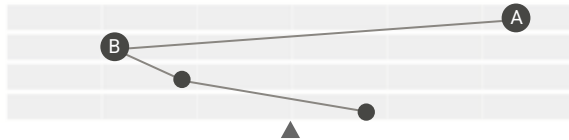


What do they value?

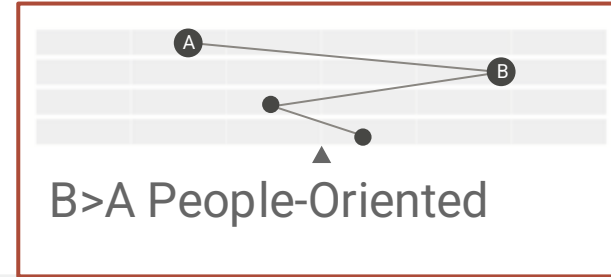
What's most important?

What frustrates them?

A:B | Orientation



A>B Task-Oriented



B>A People-Oriented

What do they value?

What's most important?

What frustrates them?

Understanding the Alien Species

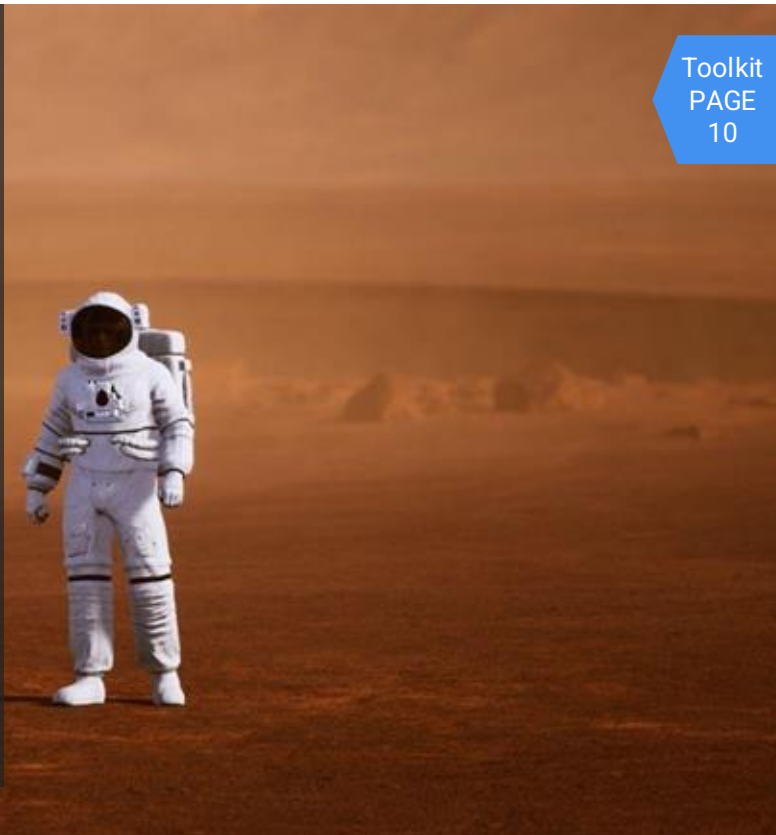
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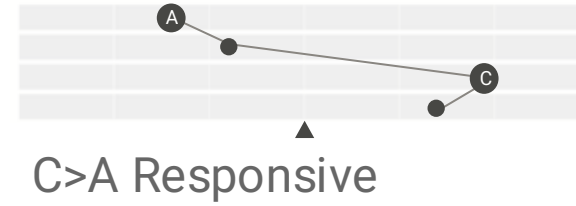
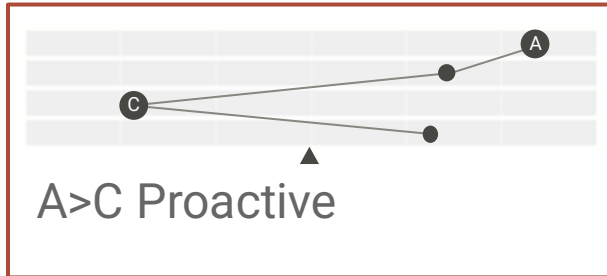
Teams:

A>C: Bethany, Alexandre, Mark, Tai, Reed, Kim, Tatianna, James, Gregory, Billy, Guy

C>A: Connor, Brian, Anita, Jeremy, Mitch, Patrick



A:C | Action

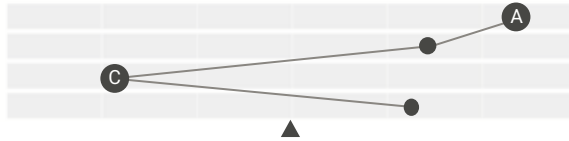


What do they value?

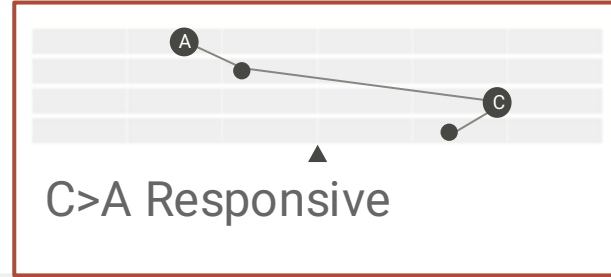
What's most important?

What frustrates them?

A:C | Action



A>C Proactive



C>A Responsive

What do they value?

What's most important?

What frustrates them?

Understanding the Alien Species

You'll pair up based on your PI Factor Combos. Fill out your workbook for your opposite Factor Combo.

- What do they value?
- What is most important to them?
- What frustrates them?

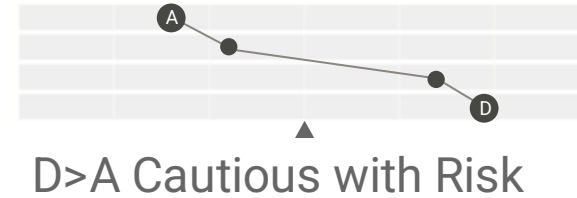
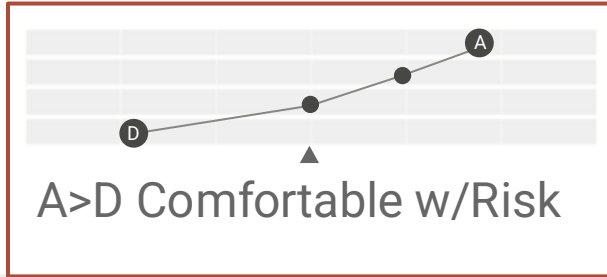
Teams:

A>D: Bethany, Alexandre, Mark, Patrick, Tai, Reed, James, Gregory, Billy, Guy,

D>A: Connor, Brian, Anita, Jeremy, Kim, Tatianna, Mitch



A:D | Risk

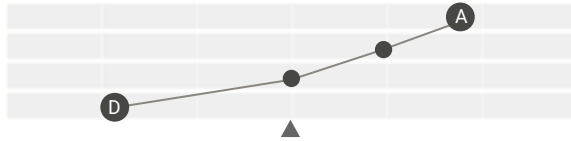


What do they value?

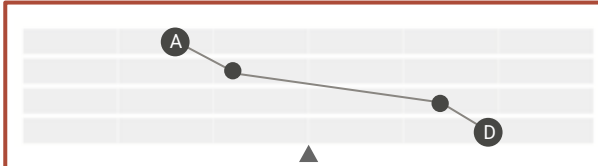
What's most important?

What frustrates them?

A:D | Risk



A>D Comfortable with Risk



D>A Cautious with Risk

What do they value?

What's most important?

What frustrates them?

What Motivates My Employees?

70%

of GREAT managers
motivate their
employees to do
outstanding work.

Leaning into Strengths is Critical

Our goal is to have people start doing something:

- more consistently
- with increased frequency
- at higher levels of quality or proficiency
- with more ease and comfort
- with more confidence, etc...

...and in some cases, we're asking people to start doing something that might be unfamiliar, new, different, unknown, unproven, daunting.



Leaning into Strengths is Critical

The adult brain likes familiar.

People need confidence to start, enhance, improve, or try something they haven't done.

Reminding people of their strengths:

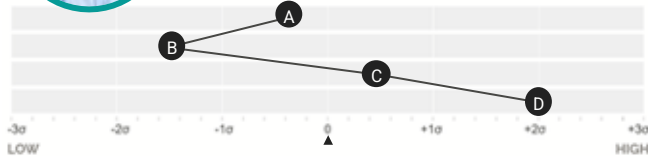
- Reminds them of what they are very good at.
- Creates confidence.
- Helps generate ideas.
- Creates ownership of ideas.
- Increases the speed to, and chances of success.



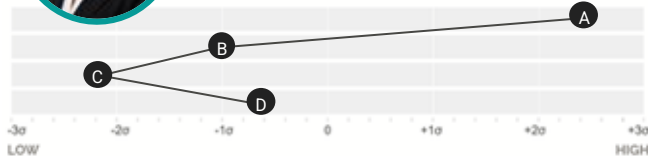
This is using simple brain science to get better outcomes.



John, Employee



Liz, Leader



COACHING CONVERSATION PREP FORM

The **goals** of this coaching session:

1. Discuss how to start improving customer relation skills
- 2.

What are their **three strongest factor combinations**? What is **valuable** about this?

1. D>B – Formal
2. D>A – Cautious with Risk
3. C>B – Takes time to connect

1. Polite, poised
2. Natural listener
3. Quality, accurate work

Their **strongest motivating needs** are:

LOW	HIGH
☐ Harmony/Collaboration	☐ Outcomes/Control
☐ Privacy/Independence	☐ Inclusion/Connection
☐ Action/Variety	☐ Stability/Predictability
☐ Freedom/Big Picture	☐ Clarity/Expectations

My **strongest motivating needs** are:

LOW	HIGH
☐ Harmony/Collaboration	☐ Outcomes/Control
☐ Privacy/Independence	☐ Inclusion/Connection
☐ Action/Variety	☐ Stability/Predictability
☐ Freedom/Big Picture	☐ Clarity/Expectations

(Farthest right and farthest left on self graph)

The areas I need to **adjust** are:

1. Tone down high A
2. Slow down the low C

Examples of **how** to adjust:

1. Be more reassuring
2. Listen to what he needs



Role Play A – but with the BA!

Take ten minutes to prep.

Play the scenario. You have ten minutes.

Take five minutes to debrief/discuss with your partner.

COACHING CONVERSATION PREP FORM

The **goals** of this coaching session:

1.
2.

What are their **three strongest factor combinations**? What is **valuable** about this?

1.
2.
3.

1.
2.
3.

Their strongest motivating needs are:

LOW	HIGH
☐ Harmony/ Collaboration	☐ Outcome/ Control
☐ Privacy/ Independence	☐ Inclusion/ Connection
☐ Action/ Variety	☐ Stability/ Predictability
☐ Freedom/ Big Picture	☐ Clarity/ Expertise

My strongest motivating needs are:

LOW	HIGH
☐ Harmony/ Collaboration	☐ Outcome/ Control
☐ Privacy/ Independence	☐ Inclusion/ Connection
☐ Action/ Variety	☐ Stability/ Predictability
☐ Freedom/ Big Picture	☐ Clarity/ Expertise

Marked right and left on self-graph

The areas I need to **adjust** are:

1.
2.

Examples of **how** to adjust:

1.
2.

Coaching Best Practices

Three Degrees of Coaching

Transformational Coaching

- Specialist coach (Executive Coaching)
- Planned development objectives
- Formal sessions

Coaching Conversation

- Help in facilitating thinking
- 1-to-1's

Operational Coaching

- 'On the fly' coaching (situational)
- Improves productivity and performance

Coaching Best Practices

Good coaching:

Is designed for the person being coached

(PI, motivating needs)

Uses assessments, data, and other tools

(Behavioral needs, cognitive agility, performance data)

Focuses on driving results in the near-term

Source: "The Coaches View" Insights on Successful Coaching From CCL

The Coaching Process

Get ready.

What's your goal for the conversation?
Identify their highest and lowest
Motivating Needs
and adjustments.

1.

State your purpose.

2.

2.

Share observations.

Their strengths.
Their behaviors/
actions/results.
Share what's in it
for them, the team,
or customers.

3.

Coach.

Ask questions.
Help them find the
solution (don't
give them the
answers!)
Transfer
ownership.

4.

Identify action items.

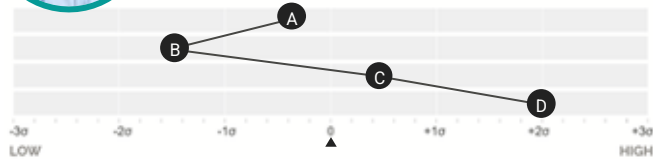
How will you
measure success/
progress?
Follow-up timing.

5.

Coaching Conversation PREP FORM



John, Employee



State **purpose**:

I want to talk about ways we can help you understand what good customer service is here, and practice it.

Questions to ask:

What would help you have a clear standard of what good customer success looks like?

Share **observations**:

Excellent confirming details; Thoughtful listener; I've seen you struggle at times with building relationships with our customers. What this would do is...

What are your thoughts on ways we could help you practice and get confident at customer interactions?

What kind of feedback would be most helpful?

Their **ideas**:

Shadow employee who exemplifies good customer service

✓ Agreement?
✓ Willingness?

Actions/next steps:

Owner:

By when?

Introduce employee, share expectations	Liz	next week
Build questions/script, set up shadow time	John	2 weeks

Success/progress measures:

Track customer satisfaction metrics
Increase confidence with customer interactions

Coaching Questions

Topic Library

COACHING QUESTIONS Topic Library

By asking powerful questions, the leader invites the employee to clarity, action, and discovery at a whole new level. They are generally open-ended questions that create greater possibility for expanded learning and fresh perspective. Below are some topics to get your questions started.

INVESTIGATIVE:

Share with me what is happening now.
Describe the results produced so far.
Tell me what's working, what's not.
Describe areas that are unclear for you.
Help me understand your vision for success.
Share what's most important for you.
Tell me what's top of mind.
Describe what's most critical.
Explain the roadblocks you're experiencing.

PRODUCTIVE:

Describe the desired outcome.
How can you get started?
What else do you need to take action?
Walk me through some options you could pursue.
Identify some milestones on the path.
Share what you'll do as a result of this conversation.
What's the timeline?
Share what roadblocks you're anticipating.
How will you know you've succeeded?

SUBJECTIVE:

Help me understand your view on this.
How do you really feel about...?
Describe what most excited you.
Share with me what you're most worried about.
Share with me what has you feeling frustrated.
Describe what you're most confident about.
Describe any hesitations you have.
Share what you'll take away from this.
How did [other person] react when you shared this with them?

SPECULATIVE:

I wonder how you might...
...capitalize on your experience?
...explore some other angles/perspectives?
...handle this another way?
...reframe this?
Describe what happens if this continues.
Describe what happens if nothing changes.
Share with me another possible point of view.
Explain the other possible options.

INTERPRETIVE:

Share what might happen if this doesn't work.
Describe the real issue here.
Share with me what led to that.
How might you look back on this in five years?
Share your assessment of the situation.
If you could do that over again, what would you do differently?

PI STRENGTHS:

Highest A

- How can you build on your natural desire for goals to see success?
- How can you adapt to be more collaborative to get outcomes you're looking for?

Highest B

- How can you use your natural ability to persuade connect to help get you the outcomes you want?
- How would being a bit more reflective in your approach enhance your credibility with others?

Highest C

- How could you apply your thoughtful, persistent approach to get the outcome you want?
- What would help make you comfortable in speed how you take action in this area?

Highest D

- How could you leverage your desire to get things right in this situation?
- What's the best way for you to get more comfort uncertain situations?

Powerful COACHING QUESTIONS

OPENING, SCOPE & FOCUS QUESTIONS

- What outcome are you seeking by the end of this discussion?
- What do you want to move forward on?
- What would be the most helpful thing for you to take away from this discussion?
- What would good look like?
- What's the issue?
- What is happening now that tells you...?
- What makes you say that?
- What's the current situation?
- What's the impact of that?
- What actions have you already taken?
- What is your concern about it?
- Bigger than more than what?
- What happened next?
- What makes you think you need to do something different?
- What else bothers you? And what else? Tell me more about that.
- What must change about the situation?

EXPLORATION & INSIGHT DEVELOPMENT QUESTIONS

- How much control do you personally have over the outcome?
- Let's look into the future: What would your ideal situation be?
- If you could do anything what would you do?
- Who else could you speak to?
- If you were to look at it from X's point of view, what do you think they would say?
- Imagine this had been achieved already – what was it that had to change?
- If Y were to get involved, where would they focus their efforts?
- What's stopping you from doing more?
- What obstacles will need to be overcome?
- How could you solve that?
- What, if any, internal obstacles or personal resistances do you have to taking action?
- What resources do you already have?
- What other resources will you need? Where will you get them from?
- What is really the issue here, the nuts of the issue or the bottom line?
- How much of the situation do you feel is within your control? (If frequently it is a big issue for people to realize that ultimately their situation is their choice. They often feel a victim and therefore experience themselves as powerless.)

Role Play B

Take 10 minutes to prep (fill out both pages of the Coaching Prep Form).

Play the scenario. You have 10 minutes.

Take a few minutes to debrief/discuss with your partner.

Coaching Conversation PREP FORM

This **goal** of this coaching session:

What are your **three strongest factor conditions**?

Your **strongest motivating factor** is:

TYPE	AREA
Personal Attributes	Character/Values
Personal Attributes	Personality/Character
Personal Attributes	Skills/Abilities
Personal Attributes	Interests/Hobbies
Personal Attributes	Work Experience

This **goal** I need to **adjust** on:

Coaching Conversation PREP FORM

State **purpose**

Questions to ask

Share **observations**

Share **ideas**

Actions/next steps

Owner	By when?

Success (progress measures)

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MindWire

Coaching High Performers

DISCUSSION:

What's difficult about coaching High Performers?

What gets in the way?

Challenges of Coaching High Performers

“They’re already good enough, I don’t have time.”

Remember the math?
It proves out!

“I don’t have the answers. I don’t know where to start.”

Your role is giving perspective and asking good questions. Let the HP build and create ownership of their own development plans.

“They are very different from me.”

Learn how to connect using their Motivating Needs.

Tips for Coaching High Performers

It's not just recognition - it's coaching and feedback.

- Your high performers have the **most potential** to improve.
- Change “this is a job” to “**this is a career.**”
- You can actually **see the impact** of your coaching.
- Coaching a high performer **is more fun!**
- You're creating a deep bench (**succession planning**).



Role Play C

Take seven minutes to prep (both pages of coaching prep form).

Play the scenario. You have 10 minutes.

Take three minutes to debrief/discuss with your partner.

Coaching Conversation PREP FORM

State **goals** of this coaching session:

What are your **three strongest target conditions**?

Your **strongest motivating needs** are:

Goal	Area
Personal Development	Personal Development
Professional Development	Professional Development
Relationship Development	Relationship Development
Personal Development	Personal Development

What **issues** / **needs** to **address** are:

Coaching Conversation PREP FORM

State **purpose**

Questions to ask:

Share **observations**

Share **ideas**

Actions/next steps

Owner	By when?

Success (progress measures)

DECATHLON V

Powered by MindWire

Build a Coaching Plan

Use your Coaching Conversation Prep Forms.

Take a moment to fill one out for a few (or more) direct reports.

Coaching Conversation PREP FORM

The **goals** of this coaching session:

- 1.
- 2.

What are their **three strongest factor combinations**?

- 1.
- 2.
- 3.

Then **strongest motivating needs** will:

Like	Want
☐ Learning/Development	☐ Recognition/Status
☐ Privacy/Independence	☐ Income/Financial
☐ Career/Power	☐ Security/Protection
☐ Freedom/Play/Leisure	☐ Family/Relationships

The project I need to **adjust** is:

- 1.
- 2.

Coaching Conversation PREP FORM

State purpose:

Questions to ask:

Share observations:

Their ideas:

☐ Spontaneous
☐ Intentional

Actions/next steps:

	Owner:	By when?

Success/progress measures:

DECATHLON V

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Resources and Next Steps

PI Management Strategy Guide

Aliza Ballard

People are complex. You should motivate and direct others based on their behavioral preferences. The following tips outline how your employee likes to be managed. **How are you doing?**

Aliza is a Persuader.

A Persuader is a risk-taking, socially poised and motivating team builder.

Strategies based on how Aliza interacts in the workplace:

- ☐ Encourage both independent and collaborative opportunities for goal achievement.
- ☐ Give them challenges and solicit input.
- ☐ Give them opportunities to identify solutions, collaboratively or independently, as they so choose.
- ☐ Allow independence and control over their own activities.

Strategies based on how Aliza takes action:

- ☐ Give them frequent challenges and varied tasks.
- ☐ Provide them with challenging assignments that require a quick turnaround.
- ☐ Allow them to voice their opinions and act on their own ideas and initiatives.
- ☐ Keep them free from routines and repetition.

Strategies based on how Aliza deals with the risk and decision making:

- ☐ Give them opportunities to make decisions and influence the big picture.
- ☐ Provide them with high-level goals but let them achieve them in their own way.
- ☐ Give them authority to make decisions and solve problems their way.
- ☐ Stay receptive to new ideas and change with minimal oversight of their activities.

Use responsibly. People are complex. This PI Insight is a helpful starting point, but there's more to this person and pattern than what's presented here. Contact a PI expert for additional insight.

PI Insights are great, but they're no substitute for the knowledge and hands-on experience gained by attending a PI workshop. Contact your PI Consultant or visit www.practiceindex.com to learn more.

PI Coaching Guide

The Coaching Guide helps you compare a person to their current job's Behavioral Target. See how Aliza's natural behaviors compare to the behavioral requirements of the role, so you can highlight potential strengths and identify areas where Aliza may need to "stretch" to meet these requirements.

Aliza: The natural behaviors Aliza displays in the workplace.

Behavioral Target: The recommended behavioral requirements needed to be most successful in the role.



To help Aliza manage their influence:

- How can you leverage your ability to take charge and lead a team?
- What could you do to take advantage of your natural tendency to be proactive?
- In what ways could you produce even better results than you are currently?

To help Aliza communicate with others:

- How could you build upon your ability to persuade and motivate others?
- In what ways could you take further advantage of your ability to support and develop those around you?
- What is the best way for you to leverage your ability to connect quickly with others in order to create better results?

To help Aliza balance variety and pace:

- How could you bring out more of your drive to work at a rapid pace and make things happen?
- What would it look like to increase your sense of urgency in order to impact your overall results?
- How could you leverage your ability to work on multiple priorities effectively?

To help Aliza approach rules and structure:

- How could you demonstrate an ability to be more thorough and detail-oriented in your work?
- What would it look like to be more structured and disciplined in your role?
- How do you comply with important rules and structure even though this may not motivate you?

Conclusion/Wrap-up

Write in your workbook and be ready to share with the group:

1. What ONE most important action/commitment will you take? Include WHEN you will take it and how you'll know you've been successful.
2. Choose an accountability partner.
3. Share your commitment with them and describe what would keep you accountable.
4. Be prepared to share out loud.



Thank you.